2025

Economic Impact of Visitors to Mesa

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TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

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Introduction

Visitors are integral to Mesa's economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of Mesa's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

KEY FINDINGS

Key Findings

Visitors Generate Significant Economic Impact

In 2025, **4.5 million visitors spent $763.9 million** in the Mesa economy, generating a total economic impact of $1.2 billion.

4.5M VISITORS TO MESA

$763.9M VISITOR SPENDING

$1.2B TOTAL ECONOMIC IMPACT

$365.0M TOTAL PERSONAL INCOME

8,137 TOTAL JOBS SUPPORTED

$85.8M STATE AND LOCAL TAXES

Results in Context

The visitor economy is an economic pillar in Mesa. In 2025, visitor spending supported one-in-14 jobs in the city. In addition:

$763.9M VISITOR SPENDING

Visitors spent $2.1 million per day in Mesa, on average.

$365.0M PERSONAL INCOME

The $365 million in total income generated by the visitor economy is the equivalent of $1,839 for every occupied household in Mesa.

8,137 JOBS

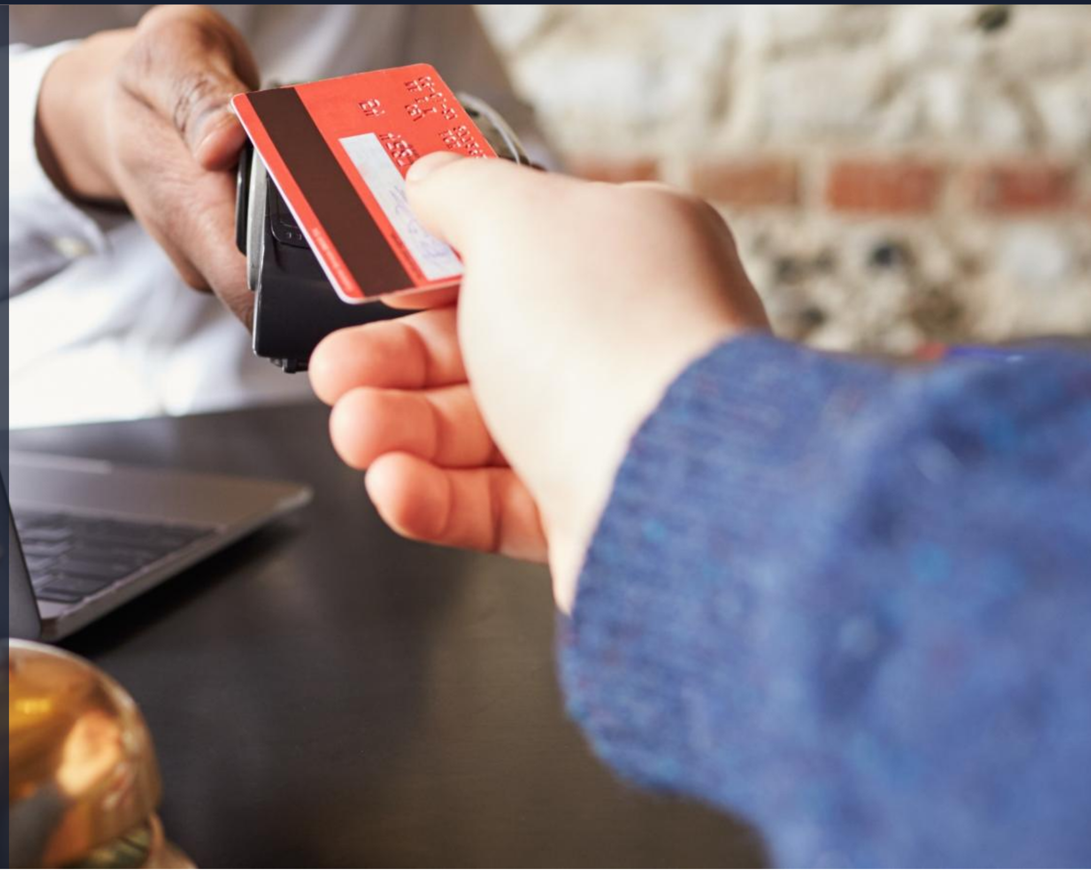
The visitor economy sustained 7.2% of all jobs in Mesa in 2025.

$85.8M STATE & LOCAL TAXES

State and local taxes generated by the visitor economy offset resident taxes by $432 per household.

VISITOR VOLUME & SPENDING

Mesa welcomed **4.5 million** visitors who spent **$763.9 million** in 2025.



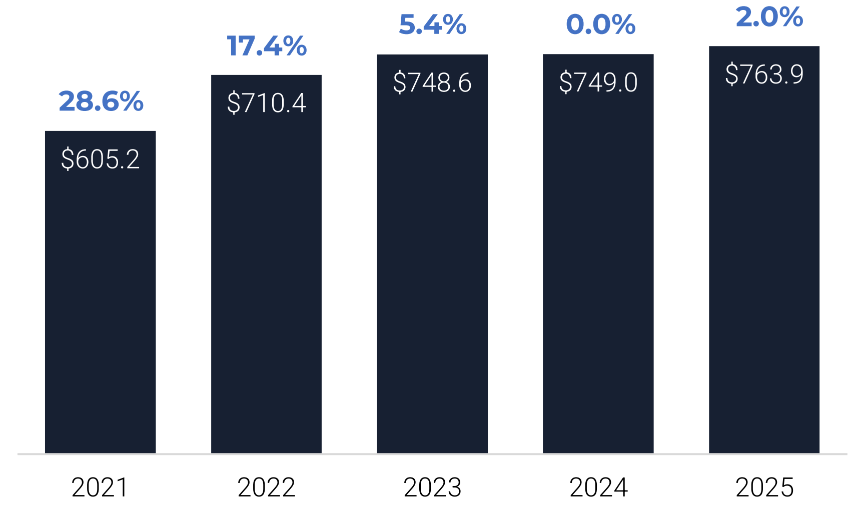
Visitor Spending

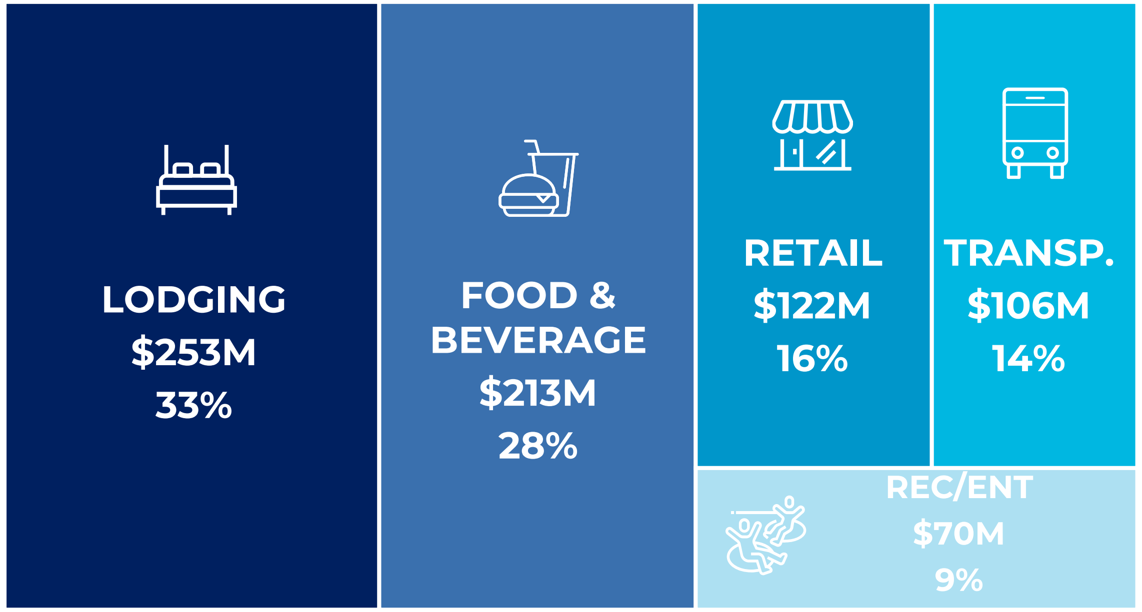
Visitor spending reached $763.9 million in 2025, an increase of 2.0% compared to the previous year.

Of the $763.9 million spent, lodging, including hotels, short-term rentals, and the value of second homes, accounted for $252.9 million—33.1% of all visitor spending.

Mesa Visitor Spending

$ millions, **% change over prior year**





Source: Tourism Economics

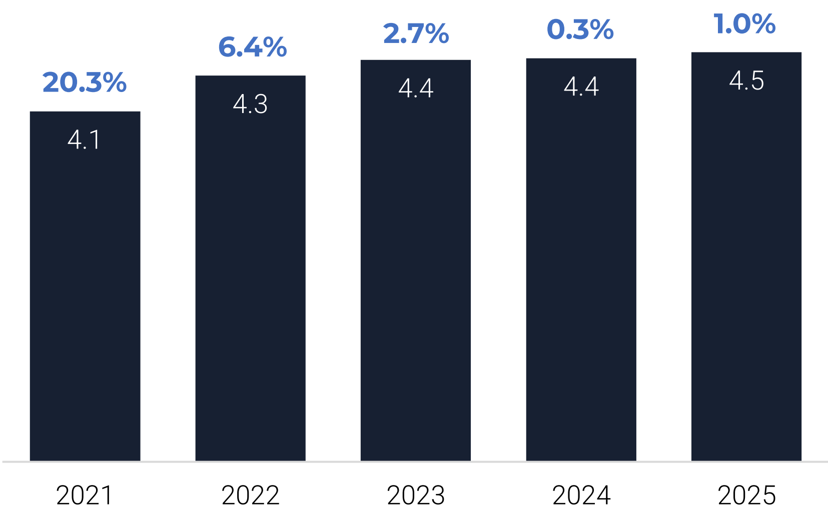
Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Visitor Volume

In 2025, 4.5 million visitors traveled to Mesa, a year-over-year increase of 1.0%. Both day and overnight segments supported growth in 2025.

Mesa Visitor Volume

millions, **% change over prior year**



Source: Tourism Economics

Visitor Volume and Spending Trends

Visitor spending grew to $763.9 million in 2025 and exhibited year-over-year growth of 2.0%.

Food & Beverage led the gains at 4.1% year-over-year, a result of strong price growth, followed closely by recreation (4.0%). Lodging spending was hindered by year-over-year declines in the average daily rate (ADR).

Overall visitor volume rose 1.0%, with domestic travel driving growth while international visitation fell 2.9% from the prior year.

Mesa Visitor Spending
$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	**$605.2**	**$710.4**	**$748.6**	**$749.0**	**$763.9**	**2.0%**
Lodging	$194.1	$243.7	$257.9	$253.7	$252.9	-0.3%
Food & Beverage	$167.1	$187.5	$198.8	$205.1	$213.4	4.1%
Retail	$103.0	$114.6	$118.5	$119.4	$121.9	2.2%
Transportation	$87.4	$102.2	$106.9	$104.0	$106.2	2.1%
Recreation	$53.6	$62.4	$66.5	$66.8	$69.5	4.0%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Subtotals may not sum to totals due to rounding.

Mesa Visitor Volume and Spending, by Segment
millions of visitors, $ millions

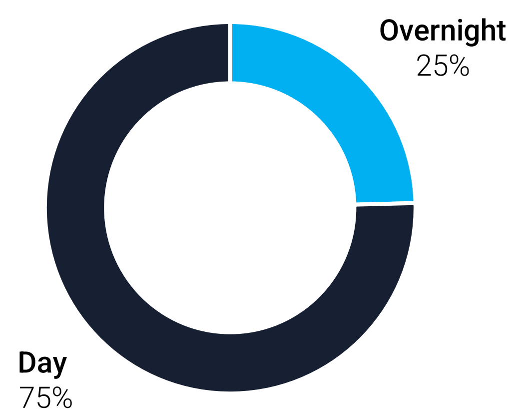
	2021	2022	2023	2024	2025	2025 Growth
Total visitors	**4.1**	**4.3**	**4.4**	**4.4**	**4.5**	**1.0%**
Domestic	4.0	4.2	4.3	4.3	4.4	1.1%
International	0.0	0.1	0.1	0.1	0.1	-2.9%
Total visitor spending	**605.2**	**710.4**	**748.6**	**749.0**	**763.9**	**2.0%**
Domestic	585.1	665.5	693.4	691.2	707.2	2.3%
International	20.1	44.8	55.3	57.9	56.7	-1.9%

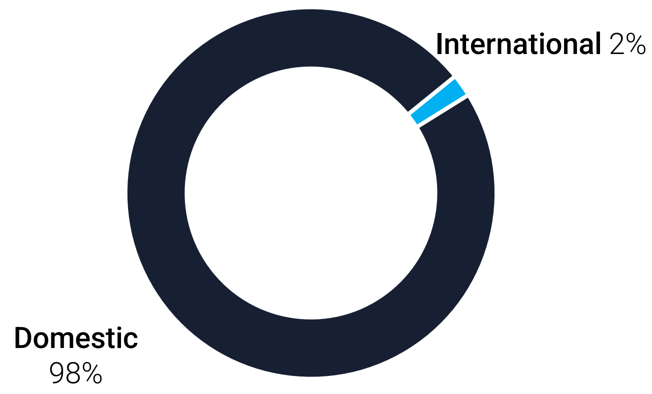
Source: Tourism Economics

Note: International visitor and spending estimates are considered preliminary.

Subtotals may not sum to totals due to rounding.

Mesa Visitation Share, by Segment





Source: Tourism Economics

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ECONOMIC IMPACT METHODOLOGY

Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provide estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

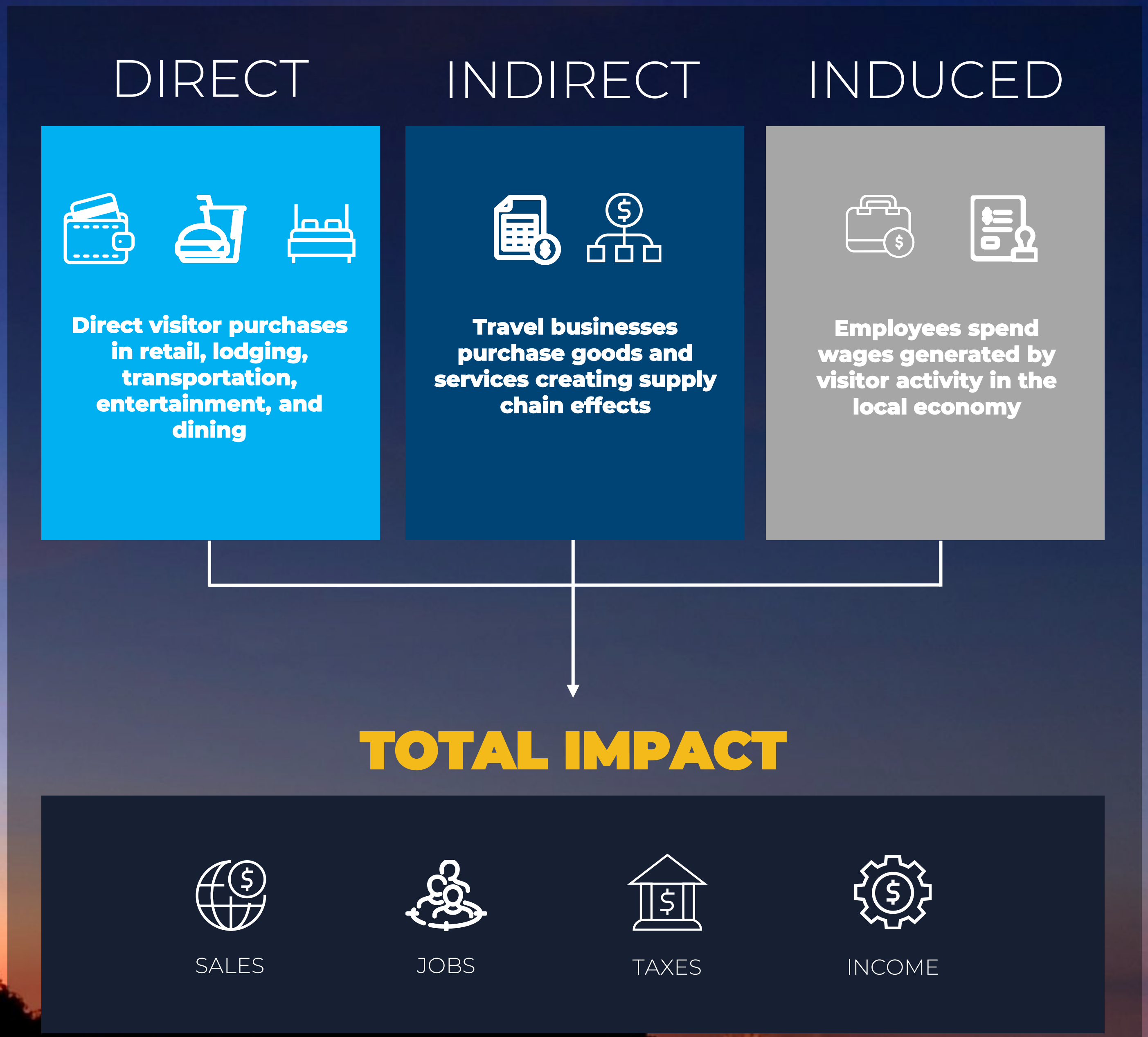
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitors through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

1. **Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
2. **Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
3. **Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

The model calculates these three levels of impact (direct, indirect, and induced) for the following metrics:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Model



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ECONOMIC IMPACT

Business Sales Impacts

Visitors spent $763.9 million in Mesa in 2025. These direct impacts generated an additional $467.5 million through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached $1.2 billion in 2025.

$764M Visitor Spending *(Direct Sales)* **+** **$231M** Indirect Sales **+** **$237M** Induced Sales **=** **$1.2B** Total Economic Impact

Note: On the visitor spending page, lodging spending includes the value of second homes. In the economic impact model, this second-home value is allocated to the Finance, Insurance and Real Estate sector, so it appears there rather than under Lodging in the Business Sales by Industry table.

Business Sales by Industry (2025)
$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$763.9**	**$230.6**	**$236.9**	**$1,231.5**
Food & Beverage	$213.4	$10.0	$21.3	$244.7
Finance, Insurance and Real Estate	$69.5	$72.3	$76.5	$218.3
Lodging	$197.9	$0.0	$0.1	$198.0
Retail Trade	$121.9	$3.8	$17.4	$143.1
Other Transport	$62.6	$15.0	$5.4	$83.0
Recreation and Entertainment	$69.5	$5.1	$3.5	$78.1
Business Services	-	$55.0	$21.3	$76.3
Education and Health Care	-	$0.6	$38.5	$39.1
Communications	-	$22.3	$11.6	$33.9
Wholesale Trade	-	$10.5	$11.5	$22.0
Construction and Utilities	-	$14.8	$6.6	$21.4
Personal Services	-	$6.9	$12.7	$19.6
Gasoline Stations	$16.3	$0.4	$1.0	$17.7
Air Transport	$12.8	$1.2	$2.0	$16.0
Government	-	$7.3	$4.2	$11.5
Manufacturing	-	$4.9	$3.1	$8.0
Agriculture, Fishing, Mining	-	$0.4	$0.3	$0.7

Source: Tourism Economics

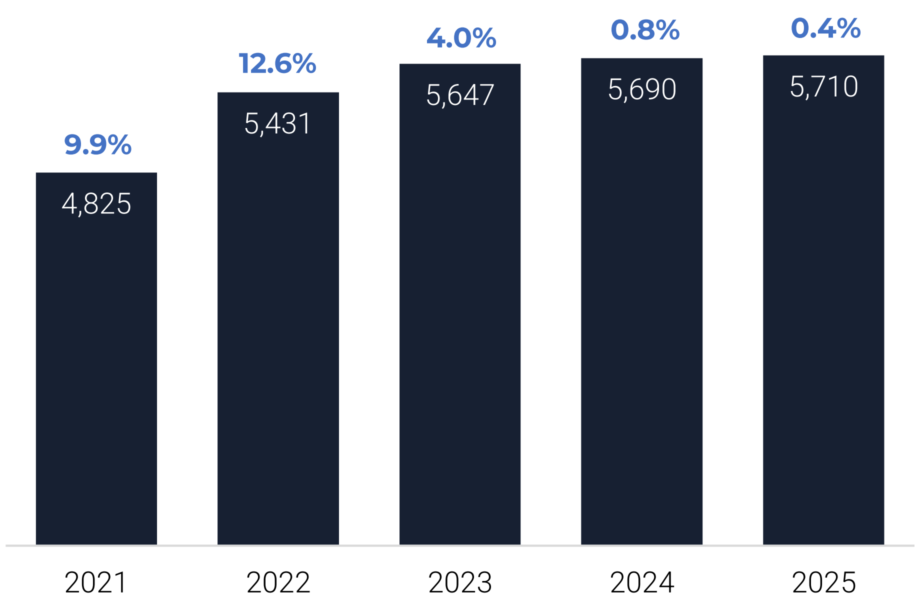
Note: Subtotals may not sum to totals due to rounding.

Visitor spending generated a total economic impact of **$1.2 billion.**

Direct Employment

Visitor activity directly supported 5,710 jobs in 2025, up 0.4% from the prior year. Growth was led by the Food & Beverage and recreation sectors, while retail and transportation-related jobs declined slightly.

Visitor-Supported Employment in Mesa
jobs, **% change over prior year**



Source: Tourism Economics

Employment Impacts

Visitor activity sustained 5,710 direct jobs in 2025, with an additional 2,427 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 8,137 in 2025, translating to one-in-14 jobs in the city.

5.7K Direct Jobs + **1.1K** Indirect Jobs + **1.3K** Induced Jobs = **8.1K** Total Jobs

Employment by Industry (2025)
jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	**5,710**	**1,124**	**1,303**	**8,137**
Food & Beverage	2,275	122	230	2,627
Lodging	1,473	0	1	1,474
Other Transport	839	118	54	1,010
Recreation and Entertainment	589	53	39	681
Retail Trade	449	28	158	635
Business Services	-	358	143	500
Finance, Insurance and Real Estate	37	244	176	457
Education and Health Care	-	5	277	281
Personal Services	-	65	130	196
Wholesale Trade	-	29	28	57
Communications	-	30	19	48
Government	-	27	14	41
Construction and Utilities	-	25	13	38
Air Transport	28	2	4	34
Gasoline Stations	21	3	8	32
Manufacturing	-	13	7	20
Agriculture, Fishing, Mining	-	1	2	3

Source: Tourism Economics

The visitor economy supported **one-in-14 jobs** in Mesa, including over 2,600 jobs in the Food & Beverage industry.

Personal Income Impacts

Visitor activity generated $215 million in direct personal income in 2025. Including indirect and induced impacts, employees received $365 million in personal income.

$215M Direct Personal Income + **$73M** Indirect Personal Income + **$77M** Induced Personal Income = **$365M** Total Personal Income

Personal Income by Industry (2025)

$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	**$215.0**	**$73.2**	**$76.9**	**$365.0**
Food & Beverage	$72.9	$4.6	$7.7	$85.2
Lodging	$61.5	$0.0	$0.0	$61.5
Business Services	-	$26.7	$11.3	$38.1
Recreation and Entertainment	$30.9	$3.3	$1.6	$35.9
Other Transport	$24.4	$6.0	$2.2	$32.5
Finance, Insurance and Real Estate	$2.6	$14.1	$11.3	$28.0
Retail Trade	$18.3	$1.2	$6.6	$26.2
Education and Health Care	-	$0.3	$21.5	$21.8
Personal Services	-	$3.8	$5.6	$9.5
Wholesale Trade	-	$3.3	$3.3	$6.7
Communications	-	$3.2	$1.7	$5.0
Government	-	$2.7	$1.2	$4.0
Construction and Utilities	-	$2.7	$1.2	$3.9
Air Transport	$3.2	$0.3	$0.4	$3.9
Gasoline Stations	$1.2	$0.2	$0.4	$1.8
Manufacturing	-	$0.6	$0.5	$1.1
Agriculture, Fishing, Mining	-	$0.1	$0.1	$0.2

Source: Tourism Economics

Note: Subtotals may not sum to totals due to rounding.

Tax Impacts

Visitor activity generated $161.4 million in government revenues in 2025.

State and local taxes alone tallied $85.8 million in 2025.

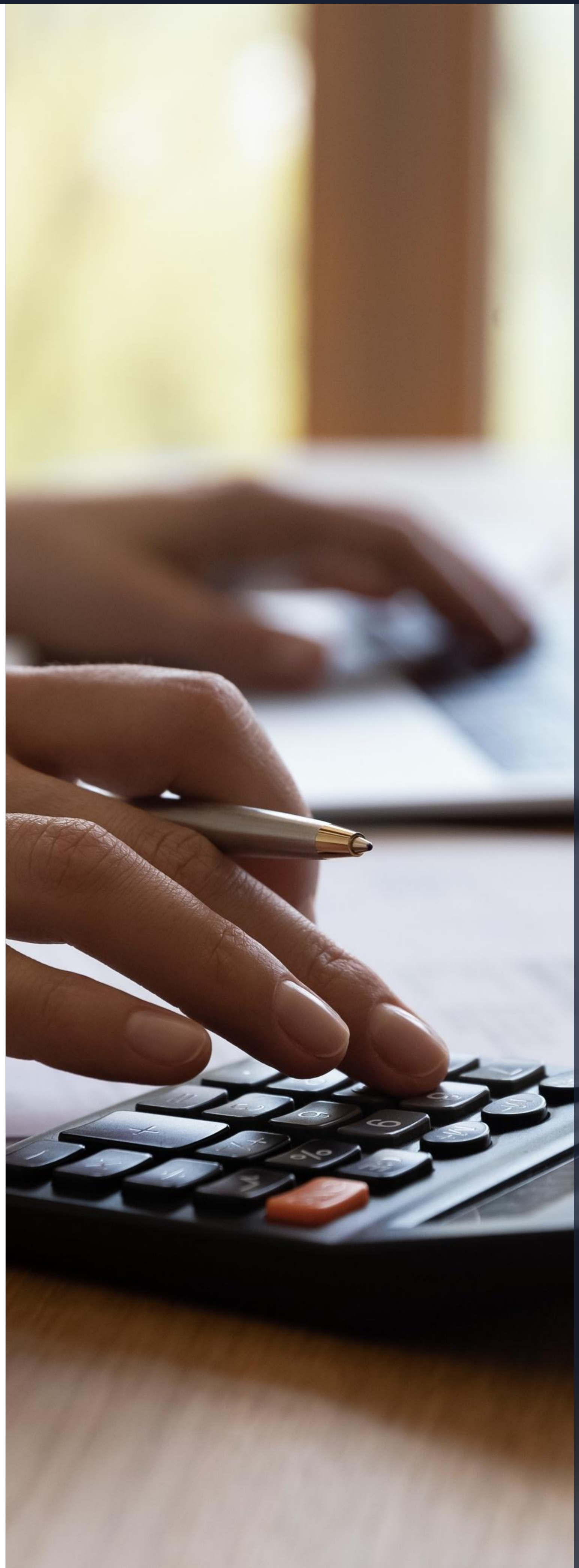
Each household in Mesa would need to be taxed an additional $432 to replace the visitor-generated taxes received by state and local governments in 2025.

Tax Impacts (2025)
$ millions

	Total
Total Tax Revenues	**$161.4**
Federal Taxes	**$75.6**
Personal Income	$27.8
Corporate	$4.2
Indirect Business	$4.4
Social Insurance	$39.1
State and Local Taxes	**$85.8**
Sales	$49.1
Bed Tax	$6.7
Personal Income	$4.7
Corporate	$0.7
Excise and Fees	$5.1
Property	$19.5

Source: Tourism Economics

Note: Subtotals may not sum to totals due to rounding.



The visitor economy generated **$161.4 million in total government revenue** in 2025, including **$85.8 million in state and local taxes**.

APPENDIX

Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as the city of Mesa, Arizona.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations. Spending is reported in nominal dollars; totals are not adjusted for inflation.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

Data Sources

- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR and KeyData:** Lodging performance data, including room demand and revenue, for hotels and short-term rentals
- **City of Mesa:** Lodging and sales tax receipts, by industry
- **BEA/BLS**: Employment and wage data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory
- **Tourism Economics:** International arrivals data for visitors to Mesa

Glossary

SPENDING DEFINITIONS	LODGING	*All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.*
	FOOD & BEVERAGE	*Includes all visitor spending on food and beverage, including at restaurants, bars, grocery stores, and other food providers.*
	RECREATION	*Includes visitor spending within the arts, entertainment, and recreation sector.*
	RETAIL	*Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.*
	LOCAL TRANSPORT	*Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.*
	AIR TRANSPORT	*Where applicable, the local share of air transportation spending.*
	SECOND HOMES	*Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.*
ECONOMIC IMPACT DEFINITIONS	DIRECT IMPACT	*Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).*
	INDIRECT IMPACT	*Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).*
	INDUCED IMPACT	*Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.*
	EMPLOYMENT	*Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.*
	PERSONAL INCOME	*Income (wages, salaries, proprietor income, and benefits) supported by visitor spending.*
	LOCAL TAXES	*City and county taxes generated by visitor spending. Includes local sales, bed taxes, usage fees, licenses, and other applicable revenue streams to local governmental authorities.*
	STATE TAXES	*State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees, and other assessments of state governments.*

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

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